

December 2006

RE: EDEExpress for Windows 2006-2007, Release 4.0

Dear EDEExpress Users:

Federal Student Aid is pleased to announce the availability of EDEExpress for Windows 2006-2007, Release 4.0. Release 4.0 is the second of three planned EDEExpress 2006-2007 enhancement releases that implement provisions of the Higher Education Reconciliation Act of 2005 (the HERA), Pub. L. 109-171.

In addition to other changes, the HERA implements two new Title IV grant programs—the Academic Competitiveness Grant (ACG) and the National Science and Mathematics Access to Retain Talent Grant (National SMART Grant). The HERA also extends Federal Direct PLUS Loan (Direct PLUS) eligibility to graduate or professional students.

Note: The HERA provides for eligible graduate or professional students to receive Direct PLUS Loans on or after July 1, 2006. The HERA provision does not create a new loan program; instead, the HERA enables a new type of borrower—an eligible graduate or professional student—to borrow under the existing Direct PLUS Loan Program. In EDEExpress 2006-2007, Release 3.0 and forward, a Direct PLUS loan for a graduate or professional student is referred to as a “Grad PLUS” loan.

EDEExpress 2006-2007, Release 4.0, enables you to export ACG and National SMART Grant origination and disbursement data for transmission to the Common Origination and Disbursement (COD) System and import responses for ACG and National SMART Grant data sent by the COD System. The COD System begins accepting ACG and National SMART Grant origination and disbursement data on December 16, 2006. Release 4.0 also resolves several EDEExpress software issues present in Release 3.0 and prior versions.

This letter includes the following information:

- An overview of EDEExpress 2006-2007, Release 4.0 enhancements related to the HERA
- A list of software issues resolved in EDEExpress 2006-2007, Release 4.0
- A preview of EDEExpress 2006-2007, Release 5.0 (available April 2007)
- Reminders on backing up and optimizing your EDEExpress database

How to Get EDEExpress and Documentation

You can download Release 4.0 and related user documentation from the U.S. Department of Education's Federal Student Aid Download (FSAdownload) Web site, located at fsadownload.ed.gov.

Instructions for downloading EDEExpress are located in the "Downloading Documentation and Software from the FSAdownload Web Site" section of the *2006-2007 Installation Guide for EDEExpress for Windows* at fsadownload.ed.gov/softexpress0607.htm.

If you have trouble accessing the FSAdownload Web site, contact CPS/SAIG Technical Support at **800/330-5947 (TDD/TTY 800/511-5806)** or by e-mail at CPSSAIG@ed.gov.

Note: Some organizations restrict their users from downloading programs from Internet sites. If you have trouble downloading, contact your technical support staff to ensure that you have full download rights.

If You Have Technical Support Questions

If you have questions regarding EDEExpress, such as installation issues, software problem resolution, or software functionality, or you require other technical assistance, contact CPS/SAIG Technical Support.

You can reach CPS/SAIG Technical Support Monday through Friday, 7 a.m. – 7 p.m. (CT), at **800/330-5947 (TDD/TTY 800/511-5806)**. You can also send e-mail inquiries, comments, or suggestions to CPSSAIG@ed.gov. A representative will respond within one business day.

You can also post questions regarding EDEExpress on our e-mail listserv, FSATECH. FSATECH is an electronic mailing list for technical questions about Federal Student Aid systems, software, and mainframe products.

Note: Make sure you include your telephone number in your message in case we need additional information. We will research your question and post our response to the mailing list so that everyone can benefit from the information.

For more information about FSATECH, including how to subscribe, go to fsa4schools.ed.gov, click "Listserve/Mailing Lists" on the left menu, and click the "FSATech" link.

If You Have Questions Regarding the COD System

If you have questions regarding the COD System, contact the COD School Relations Center at 800/4PGRANT (800/474-7268) for ACG, National SMART Grant, and Pell Grant or 800/848-0978 for Direct Loan. You can also e-mail CODSupport@acs-inc.com.

If You Have Questions Regarding the HERA

If you have policy-related questions regarding the HERA, contact Federal Student Aid's Research and Customer Care Center (RCCC) at 800/433-7327 or by fax at 202/275-5532. You can also e-mail the RCCC at fsa.customer.support@ed.gov. Hours are 9 a.m. to 5 p.m. ET, Monday through Friday, excluding federal holidays.

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EDEExpress for Windows 2006-2007, Release 4.0 Overview

EDEExpress for Windows 2006-2007, Release 4.0 can be installed as an upgrade to Release 1.0, Release 2.0, or Release 3.0. You must have Release 1.0, Release 2.0, or Release 3.0 installed to run an upgrade (or “custom”) installation.

Reminder: Before upgrading to Release 4.0, ensure you have a valid, reliable backup copy of your current EDEExpress 2006-2007 database (expres67.mdb).

To upgrade to Release 4.0, select either the Stand Alone Custom or Workstation Custom option during installation, depending on your EDEExpress operating environment.

If you have not installed EDEExpress 2006-2007 on your system, you can proceed directly to a Stand Alone Full or Network Server/Workstation Full installation of Release 4.0. Be aware, however, that a Stand Alone Full or Network Server/Workstation Full installation will load a completely new, blank 2006-2007 EDEExpress database to your system. If a database already exists for 2006-2007 on your system, a full installation of Release 4.0 will overwrite it and all data previously entered will be lost.

For more information on the EDEExpress installation process, see the *2006-2007 Installation Guide for EDEExpress for Windows*, which is available for download from the FSAdownload Web site at fsadownload.ed.gov/softexpress0607.htm.

Release 4.0 Enhancements Related to the HERA

The Higher Education Reconciliation Act of 2005 (the HERA), Pub. L. 109-171, implements two new Title IV grant programs—the Academic Competitiveness Grant (ACG) and the National Science and Mathematics Access to Retain Talent Grant (National SMART Grant). The HERA also extends Federal Direct PLUS Loan (Direct PLUS) eligibility to graduate or professional students. In EDEExpress 2006-2007, Release 3.0 and forward, a Direct PLUS loan for a graduate or professional student is referred to as a “Grad PLUS” loan.

In September 2006, Federal Student Aid posted EDEExpress 2006-2007, Release 3.0, the first of three planned software releases adding enhancements related to the HERA, including the ability to create origination and disbursement records for ACG and National SMART Grant awards. For more information on Release 3.0 enhancements related to the ACG, National SMART Grant, Grad PLUS, and other changes based on the HERA, see the *EDEExpress for Windows 2006-2007, Release 3.0 Cover Letter* on the FSAdownload Web site at fsadownload.ed.gov/softexpress0607.htm.

EDEExpress 2006-2007, Release 4.0 builds upon functionality added in Release 3.0 and enables you to export ACG and National SMART Grant origination and disbursement data for transmission to the COD System and import responses for ACG and National SMART Grant data sent by the COD System.

ACG and National SMART Grant data is exported and imported in Release 4.0 using the existing Pell export (**File, Export, Pell**) and Pell import (**File, Import, Pell**) functionality. You can also use existing Pell export selection criteria options to filter your export for specific records.

Data for both new grant programs is exchanged with the COD System using the COD Common Record (message class **CRAA07IN**) and COD Common Record Response (message class **CRAA07OP**). Release 4.0 will also enable you to import COD Web-Generated Responses (message class **CRWB07OP**) for ACG and National SMART Grant data you process on the COD Web site (cod.ed.gov).

ACG and National SMART Grant records are also now included in Pell record count statistics displayed on the List–Student Records in Document and List–Document Activity reports.

Note: The COD System begins accepting ACG and National SMART Grant origination and disbursement data on December 16, 2006.

Note: For further information regarding the use of EDEExpress and the COD System Web site to update 2006-2007 ACG and National SMART Grant data, review the “Summary: EDEExpress for Windows 2004-2005, Release 2.0 Guidance for COD Web-Initiated Pell Origination and Disbursement Activity” network message, posted on April 6, 2004 in the “2004” folder of the “Electronic Announcements” section of the U.S. Department of Education's IFAP Web site, located at ifap.ed.gov.

For more information on enhancements to Application Processing, Packaging, Pell, Direct Loan, and Global functionality related to the HERA, see the September 2006 addenda to the *EDEExpress for Windows 2006-2007, Release 1.0 Desk Reference* and the *EDEExpress for Windows 2006-2007, Release 2.0 Desk Reference*. Both documents are available on the FSAdownload Web site at fsadownload.ed.gov/softexpress0607.htm.

Software Issues Resolved in Release 4.0

In addition to implementing import and export functionality for the ACG and National SMART Grant, the following software issues, listed by module, are resolved in Release 4.0:

Application Processing

- Due to an address change for the U.S. Department of Education's Collections unit, we updated the text for SAR Comment Codes 041 to 043, 065 to 067, 100 to 102, and 251 to 253.

Pell

- Pell Multiple Entry no longer generates a “No changes to save” error message when you attempt to modify previously entered data for a field using the Select Records option under Selection Criteria.

Note: This issue only impacts multiple entry fields using a combo box (for example a drop-down arrow enabling you to select from multiple valid values) on the final grid displayed during the multiple entry process. Verification Status is an example of a common entry field that uses combo box functionality in Pell Multiple Entry.

Direct Loan

- Custom MPN Printer templates you have established for PLUS loans in **Tools, Setup, COD, MPN Printer** are now available for selection when printing Grad PLUS MPNs (by selecting **File, Print, Direct Loan, MPN-Grad PLUS**).
- EDEExpress no longer clears most of the data you have entered on the PLUS Info tab on the Direct Loan Origination tab if the origination process fails due to missing/invalid information or other origination data edits.
- The Direct Loan Origination tab now correctly updates the Loan Period and Academic Year dates associated with a disbursement profile if you change the disbursement profile code on a record immediately following a failed attempt to originate the loan (using **Process, Originate**).
- If you create a Grad PLUS loan record for a student by importing ISIR data (**File, Import, Direct Loan, Loan Data-ISIR**) and then delete the Grad PLUS record using **File, Delete, Direct Loan** (outside the student record), you can now create a new Grad PLUS loan record for the same student using the same ISIR import option. In Release 3.0, a database field was not reset following Global deletion of a Grad PLUS loan record; this prevented a subsequent ISIR import for the same student and loan type unless you selected “Prompt for Duplicates” on the import and allowed the new record to be created when prompted.
- EDEExpress now correctly updates the Credit Decision field on Grad PLUS loan records when you import a Credit Decision Override Response (message class CRCO07OP) sent by the COD System
- The Direct Loan export process for PLUS and Grad PLUS records now exports the value entered for the Student’s Loan Default/Grant Overpayment field to the COD System. Previously, EDEExpress exported the value for the Borrower’s Loan Default/Grant Overpayment field for both the student and the borrower in COD Common Record files.

- When you clear the checkbox for the Direct Loan Origination tab field “Additional Unsub Eligibility for Health Profession Programs?” on an accepted origination record that had this checkbox selected, EDEExpress will now export this modified data to the COD System. Previously, schools had to use the COD Web site to clear the value for the “Additional Unsub Eligibility for Health Profession Programs?” field on an origination record if the field was selected and exported using EDEExpress and accepted by the COD System.
- We updated the Direct Loan Disburse tab to enable the Export to External checkbox for anticipated disbursement records (Disbursement Release Indicator = False, or cleared). This change enables you to re-export an anticipated disbursement record you have updated to an external system after including the record in a previous Direct Loan External Export (**File, Export, Direct Loan, External Loan Data**).
- The EDEExpress Direct Loan Disburse tab no longer generates a software error message when you set the Disbursement Release Indicator (DRI) to True (or selected) for the first disbursement, save the record, then click the Add Disbursement button.
- EDEExpress now enables you to print a Grad PLUS MPN before or after originating the loan record without adversely affecting the MPN Status field or Signed MPN Received date information you have entered.
- When printing a Disclosure Statement (**File, Print, Direct Loan, Disclosure Statement – Sub/Unsub**) for a student record with both subsidized and unsubsidized loans, EDEExpress now correctly identifies the Loan Type for each loan on the report and always prints the subsidized loan information first.

Preview of EDEExpress 2006-2007, Release 5.0

EDEExpress 2006-2007 will be modified in one additional upcoming release to further enhance ACG, National SMART Grant, and Direct Loan functionality. Release 5.0, available April 2007, will add the following enhancements:

- Update Direct Loan functionality, including the origination process, to follow increased annual loan limits established by the HERA for Direct Subsidized and Direct Unsubsidized loan awards. For more information on the HERA’s annual loan limit changes for the Direct Stafford Loan Program, see [Dear Colleague Letter GEN-06-02](#), posted on the Information for Financial Aid Professionals (IFAP) Web site, located at ifap.ed.gov, on March 10, 2006.

Note: The higher loan limits apply to loans first disbursed on or after July 1, 2007. The COD System will use the date of the earliest anticipated disbursement (DRI = False) if there are no actual disbursements (DRI = True) when determining the appropriate loan limits to apply. The COD System will use the earliest actual disbursement, if both actual and anticipated disbursements exist for a loan, when determining the appropriate loan limits to apply.

- The EDEExpress Package/Repackage process will not be modified to award subsidized loans (Aid Type **S**) or unsubsidized loans (Aid Type **U** or **D** for non-need based or need-based unsubsidized loans, respectively) at the new loan limits until EDEExpress 2007-2008, Release 1.0. Users of EDEExpress 2006-2007 Packaging can increase subsidized and unsubsidized awards manually to the new limits on Packaging records at any time.
- The HERA made changes to the Higher Education Act of 1965 to reduce the loan fee charged to Stafford borrowers in the Direct Loan Program. This fee drops to 2.5 percent on July 1, 2007; 2.0 percent on July 1, 2008; 1.5 percent on July 1, 2009; and 1.0 percent on July 1, 2010. For any 2006-2007 Stafford Subsidized or Unsubsidized loans that have a first disbursement date on or after July 1, 2007, the Sub/Unsub Loan Fee Percentage in COD School setup (Direct Loan) must be changed to 2.5 percent.
- Update Pell functionality to enable the export of ACG and National SMART Grant Data Requests to the COD System and the import of ACG and National SMART Grant-specific versions of files such as the Year-to-Date (YTD) and Multiple Reporting Record (MRR).

2006-2007 COD Technical Reference

Volume III (Direct Loan and Pell Combination System Supplement) of the *2006-2007 COD Technical Reference* has been updated to add information and guidance related to the HERA, including importing ACG, National SMART Grant, and Grad PLUS origination and disbursement data from an external system into the EDEExpress software (in addition to Pell and other Direct Loan loan types).

You can download the latest version of Volume III of the *2006-2007 COD Technical Reference* from the FSAdownload Web site, located at fsadownload.ed.gov.

Reminders

Back Up Your Database Regularly

You should back up your EDEExpress database file (expres67.mdb) regularly so you do not lose your data. We recommend that you back up your files after each major update to your database (for example, after updating a large group of origination or disbursement records), or at least once a week. You should also back up your data before and after you run the software utilities as a precautionary measure.

EDEExpress does not include a backup utility. You must use your own backup system. Be sure to test your backup system regularly to verify that you can reliably restore your database.

Optimize Your Database with Software Utilities

EDEExpress contains utilities that enable you to optimize your database to prevent problems. We recommend that you run the Compact and Repair Database and Verify Database utilities at least once a week. Be sure to create a backup of your database before and after running these utilities.

Run the software utilities in the following order:

- Compact and Repair Database
- Verify Database
- Compact and Repair Database

Run the Compact and Repair Database Utility

The Compact and Repair Database utility resolves inconsistencies in record storage and improves the performance of the EDEExpress database. Running this utility at least once per week helps to prevent database problems.

Events such as a power outage or a Local Area Network (LAN) failure can corrupt your database if it occurs while users are logged into EDEExpress. If your system functions unpredictably (for example, you start getting database error messages), run the Compact and Repair Database utility.

Running the Compact and Repair Database utility on a regular basis can make your database significantly smaller and improve EDEExpress' performance. The utility reduces the size of your database by organizing and storing records more efficiently and by removing any records that have been flagged for deletion.

Warning: Before using the Compact and Repair Database utility, be sure you have space on your hard drive or LAN folder that is at least equal to three times the current size of the database. You should also ensure all other users are logged out of EDEExpress before running the Compact and Repair Database utility.

Run the Verify Database Utility

Each student record in EDEExpress has multiple parts that are stored in different database tables. The Verify Database utility checks the integrity of relationships between these tables. If EDEExpress shuts down due to a program error or halts abnormally while you are processing data, links between various parts of a record may become damaged. Verify Database repairs these damaged links within the database.

You should always run the Compact and Repair Database utility before and after running the Verify Database utility. Running this utility at least once per week is recommended as part of your preventative maintenance routine.

Warning: Before using the Verify Database utility, ensure you have hard drive or LAN folder space available that is equal to at least three times the current size of your EDEExpress database. You should also ensure all other users are logged out of EDEExpress before running the Verify Database utility.